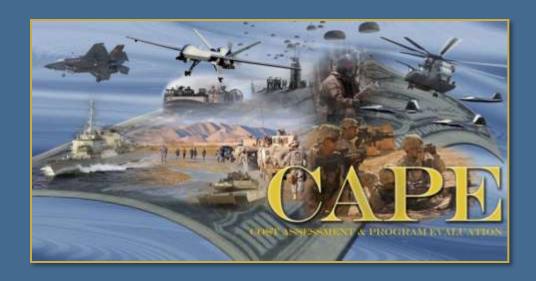
#### Defense Cost and Research Center

CSDR Submit-Review Website
Submitter Guide
8/1/2014





#### Submitter Training

- The following document provides step-by-step screenshots to illustrate the major actions performed by Submitters in the CSDR-SR system:
  - Obtaining an ECA Certificate
  - Requesting a DCARC account
  - Logging in to the CSDR Submit-Review system
  - Upload Home Overview
  - Submitting Excel Cost Reports
  - Submitting XML Cost Reports
  - Submitting Software Reports and CWBS Dictionaries
  - Viewing CSDR Plans



## Obtaining an ECA Certificate



#### Obtaining an ECA Certificate

- Before you will be able to request access to the DCARC Portal you will first need to have a valid CAC or ECA Certificate.
- The type of ECA certificate required is a Medium Token Assurance Identity Certificate.
- To locate approved certificate vendors please visit the ECA PKI Program Website at: http://iase.disa.mil/pki/eca/index.html



### Requesting a DCARC Account



### Requesting a DCARC Account

http://dcarc.cape.osd.mil
 To request a DCARC Portal
 account, select the "Request
 Portal Access" link.

If you already have a DCARC
 Portal account, you do not need to register for a new account. Please contact <a href="mailto:DCARCSupport@Tecolote.com">DCARCSupport@Tecolote.com</a>
 for assistance.

#### Defense Cos and Resour

From the DCARC
Home page select
the "Request
Portal Access" link

Home

#### **DCARC Portal**

#### **Portal Login**

Access to DACIMS, CSDR-SR, cPetWeb, 1921-3 & FPR, EVM-CR, Visual Display

Request Portal Access
Registration Instructions

#### eRoom Login

Access to Plan Development Forum

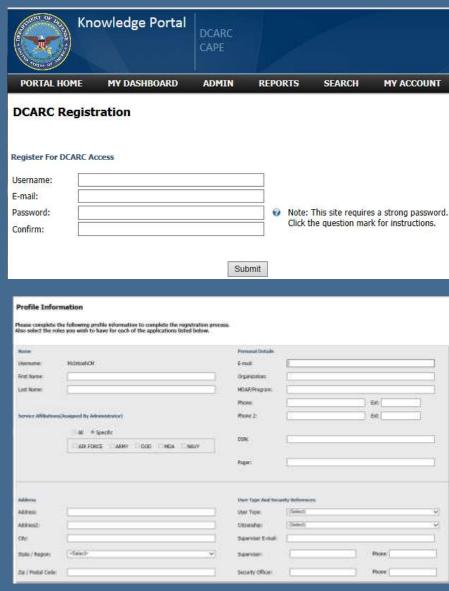
Request eRoom Access



#### Account Registration

<u>OSO CAPE/OCASC</u>

- Create a username and password and fill out the user profile.
- When completing the account request form, request the "CSDR-SR Submitter" role.
- Click "Submit" to begin account approval process.





### Logging into CSDR-SR System



## Logging into CSDR-SR System

- After logging in, select the CSDR-SR link.
- If you have an EVM-CR
   account and did not have
   to request a new account,
   select the "Request
   Application Roles" link to
   add the CSDR-SR
   Submitter role to your
   account.

Select the "CSDR-SR" link

Select the "Request application roles" link to add "CSDR-SR Submitter" role





### Logging into CSDR-SR System

<u>nso capejocasc</u>

Select the Upload Home tab to continue:

Select "Upload Home" to access submissions



**Knowledge Portal** 

DCARC CAPE

**PORTAL HOME** 

**CSDR-SR HOME** 

**UPLOAD HOME** 

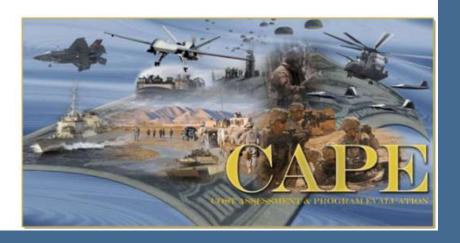
CONTACT US

#### Welcome to CSDR-SR

#### **User Guides**

Reviewer Guide - Illustrates to reviewers how to request an account, review/comment on data submissions, view CSDR plans, and review future submission events.

Submitter Guide - Illustrates to submitters how to request an account, upload documents, and view CSDR plans.



10

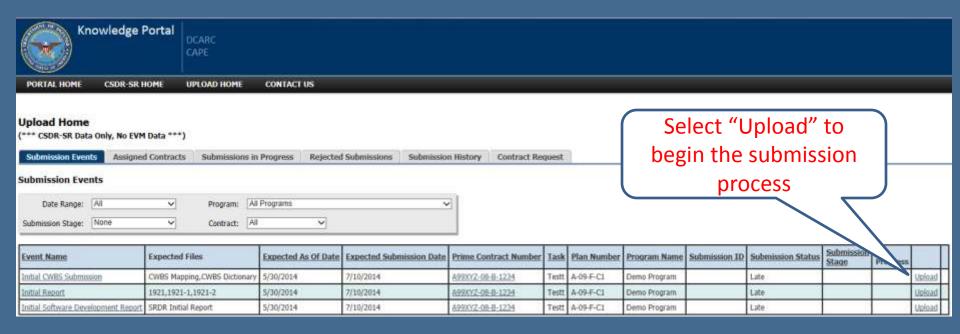


# **Upload Home Overview**



#### **Upload Home: Submission Events**

- On the "Upload Home" page, select the "Upload" option on the right side of the table to begin uploading files for a given submission event.
- If you have submissions due within the next 60 days that are not showing up, please contact the Lead Reviewer from your government Program Office.

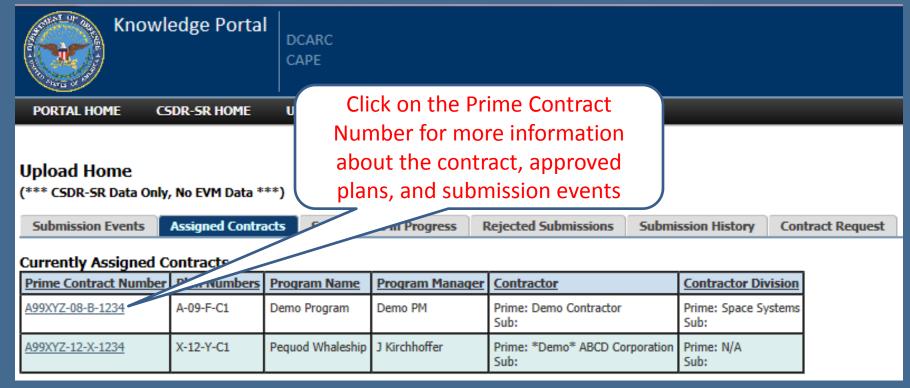


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## Upload Home: Assigned Contracts

- The "Assigned Contracts" tab shows the Submitter which contracts they are assigned to in the Submit-Review website.
- If a contract that you are required to submit reports for is not listed here, click on the "Contract Request" tab:





#### Upload Home: Submissions in Progress

<u> OSO CAPE/OCARC</u>

• The "Submissions in Progress" tab displays the submissions that have either been started, but not submitted, or submissions that have been set back to "In Process: Contractor" by the DCARC Validation Analyst:

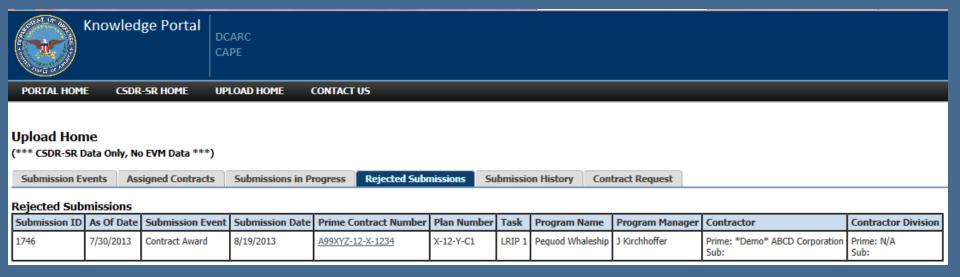




#### Upload Home: Rejected Submissions

<u>nsa cape/acase</u>

 The "Rejected Submissions" tab displays a record of the submissions that have been formally rejected by the Director of the DCARC:





### **Upload Home: Submission History**

<u>OSO CAPE/OCASO</u>

• The "Submission History" tab displays a historical record of all submissions, in all stages, for the history of the Submitter:

	To a series of		CAP								
	PORTAL HOMI	E CSDR	R-SR HOME UPLO	DAD HOME CONTA	CT US						
Enter Search		ata Only, No	o EVM Data ***)								
	Submission Ev	vents Ass	signed Contracts	Submissions in Progress	s Rejected Submission	s Submissi	on Histo	Contract R	equest		
a specific submission or set of submissions	Search Submis Submission As Of Dat Search Sub Hide Search Histor	sion ID:  n Stage: Any te After:	y Stage	Contract Number: Program: As Of Date Before:	All Programs	~					
	Submission ID	As Of Date	<u>Submission Event</u>	<u>Submission Date</u>	Prime Contract Number	<u>Plan Number</u>	<u>Task</u>	<u>Last Status Date</u>	<u>Last Status Set By</u>	<u>Status</u>	<u>Stage</u>
	<u>1861</u>	5/30/2014	Initial Report		A99XYZ-08-B-1234	A-09-F-C1	Testt	7/17/2014	Test CSDRSubmitter	Late Submit	Submitting
Click on the	<u>1838</u>	4/30/2014	Test 6/13		A99XYZ-12-X-1234	X-12-Y-C1	LRIP 1	6/30/2014	Test CSDRSubmitter	Late Submit	Submitting
Click on the	<u>1837</u>	4/30/2014	Test 6/13		A99XYZ-12-X-1234	X-12-Y-C1	LRIP 1	6/30/2014	Test CSDRSubmitter	Late Submit	Submitting
Submission ID #	1785	4/23/2014	CWBS Index and Diction	onary 6/6/2014	A99XYZ-12-X-1234	X-12-Y-C1	LRIP 1	6/6/2014	James Kirst	Contractor	Submitting

A99XYZ-12-X-1234

A99XYZ-12-X-1234

A99XYZ-12-X-1234

A99XYZ-12-X-1234

A99XYZ-12-X-1234

A99XYZ-12-X-1234

8/19/2013

X-12-Y-C1

X-12-Y-C1

X-12-Y-C1

X-12-Y-C1

X-12-Y-C1

X-12-Y-C1

LRIP

LRIP 1

LRIP

LRIP 1

LRIP 1

LRIP 1

4/21/2014

4/21/2014

4/18/2014

4/18/2014

4/18/2014

7/17/2014

Test CSDRSubmitter

Test CSDRSubmitter

Test CSDRSubmitter

Test CSDRSubmitter

Test CSDRSubmitter

Charlotte McIntosh

Late Submi

Late Submi

Late Subm

Late Subm

Late Subm

Rejected

Submitting

Submitting

Submitting

Submitting

Submitting

Finalized

Submission ID #
to see the details
of the historical
submission

Download Results to Excel

4/18/2014

4/21/2014

4/18/2014

4/18/2014

4/18/2014

7/30/2013

Final Report

Interim Report 3

Interim Report 1

Interim Report 2

Initial Report

Contract Award

1784

1781

1779

1746

**Knowledge Portal** 



#### Upload Home: Contract Request

- ISD CAFE
- The "Contract Request" tab allows a Submitter to enter the Prime Contract Number or CSDR Plan Number.
- Clicking "Send Request" will alert the DCARC Validation
   Analysts that you need to be added to the contract:

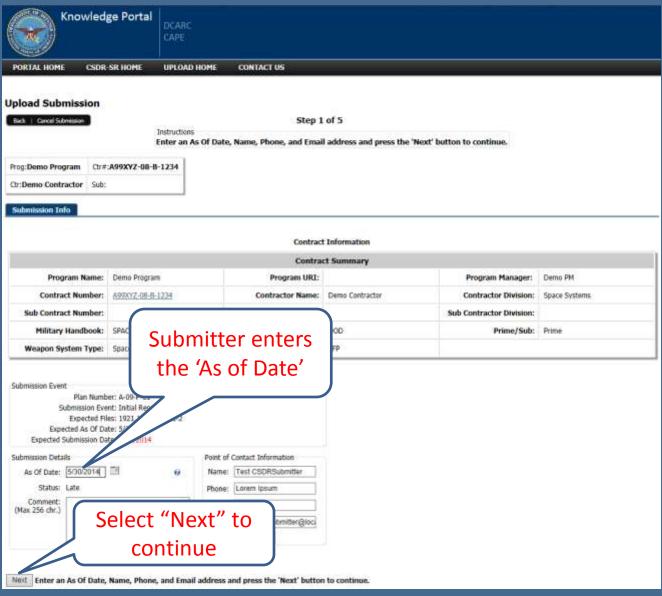
Know		OCARC CAPE				
PORTAL HOME	CSDR-SR HOME U	JPLOAD HON	Enter the	Contract Numb	ner	
Upload Home (*** CSDR-SR Data Only, No EVM Data ***)			or Plan N "Se			
Submission Events	Assigned Contracts	Submission	De Cass	Rejected Submissions	Submission History	Contract Request
Please enter the contra Contract Number: Plan Number: Send Request	act number of the reque	est. send	ling the request,	the appropriate authority	will review the reque	st and act accordingly.



# Submitting Excel Cost Reports



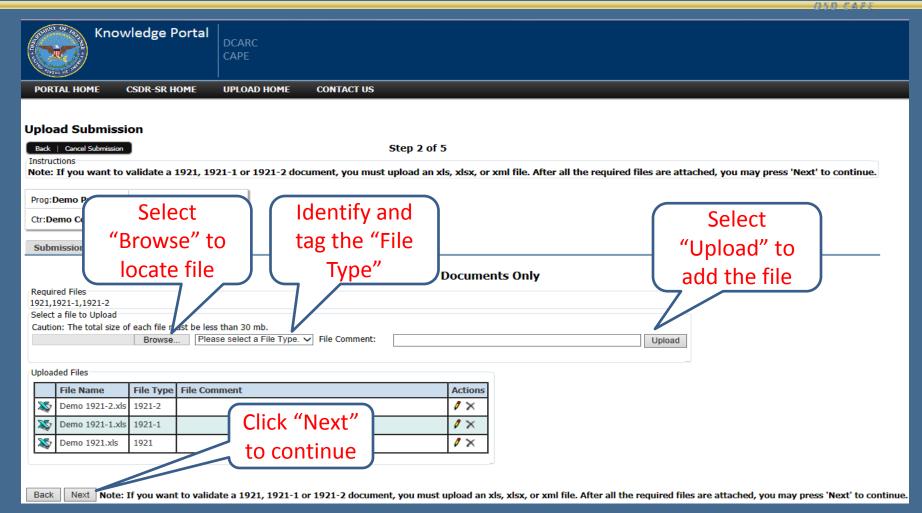
#### Step 1: Submission Info



- The Submitter will enter the report 'As of Date'
- Once the POC Information has been verified, select "Next" to continue



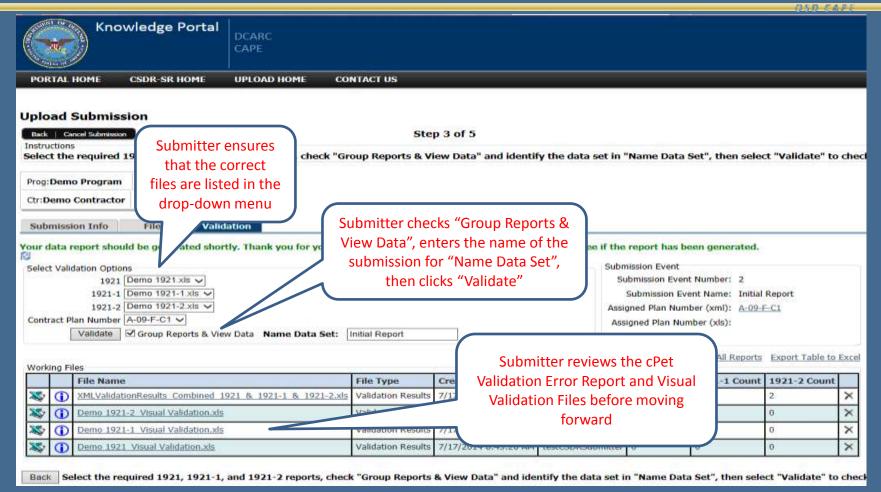
### Step 2: Upload Files



- To upload the Excel 1921 reports, select "Browse" to locate the report, select the correct "File Type", and click "Upload"
- Click "Next" to continue



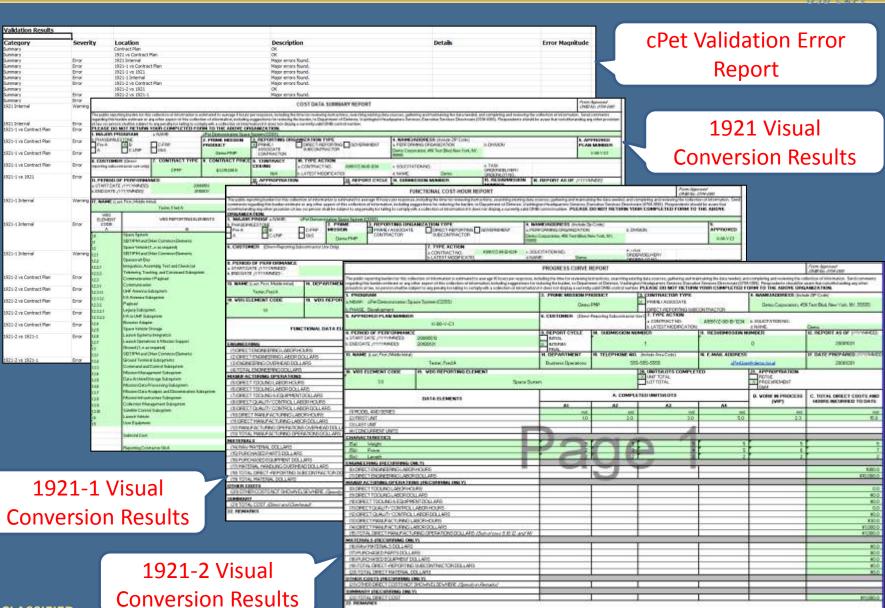
#### Step 3: Validate and Create Data Report



- Submitters must generate CCDR Data Report prior to submitting reports
- If the submission event requires multiple sets of 1921, 1921-1, and 1921-2 reports, a CCDR Report must be generated for each data set. For example, the report names could be: "Variant 1" and "Variant 2"

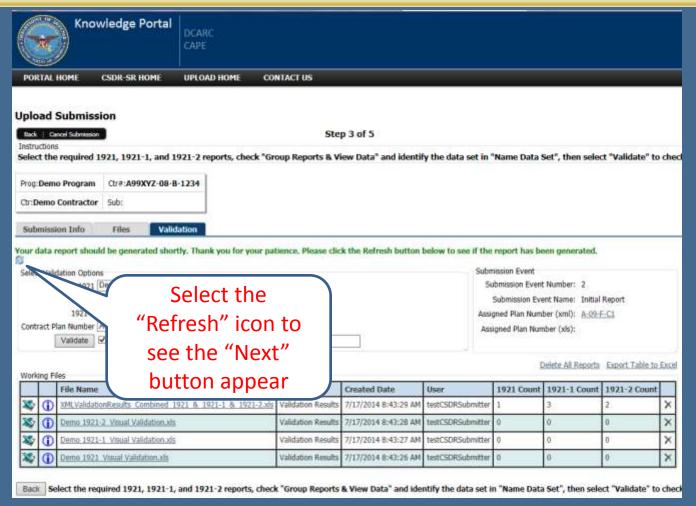


#### Step 3: Validate and Create Data Report, cont.





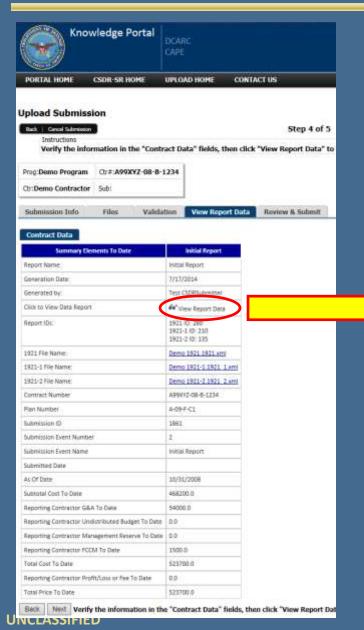
#### Step 3: Validate and Create Data Report, cont.



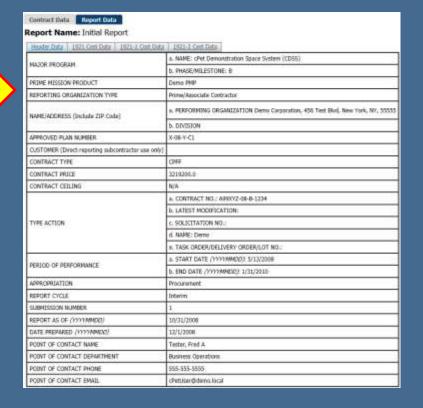
- The Data Report takes a minute to display
- Click the "Refresh" icon to see if the report has been generated
  - The "Next" button will appear when the report has been generated



#### Step 4: View Data Report

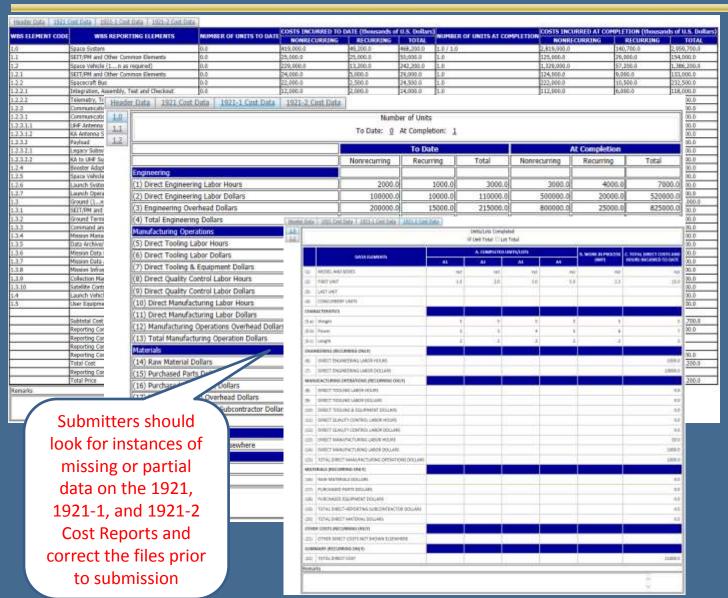


 Submitter clicks "View Data Report" to review Header Data, 1921 Cost Data, 1921-1 Cost Data, and 1921-2 Cost Data to ensure their data converted to XML will be viewed accurately within the Submit-Review database:





#### Step 4: View Data Report, cont.

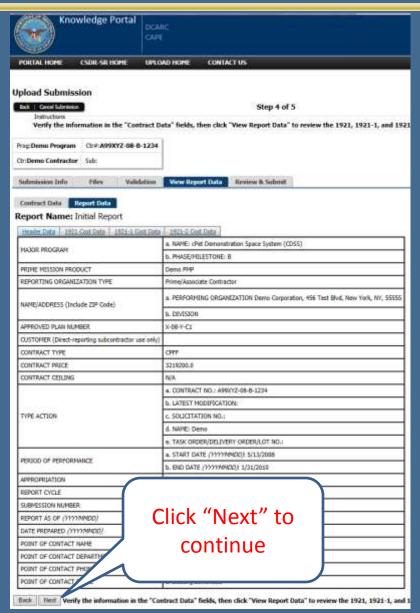


- The Data Report displays how the data will be viewed within the Submit-Review database
- Submitters
  should review
  the data for
  accuracy and
  completeness
- If the data is not reading into the Data Report correctly, the Excel file should be updated prior to submission

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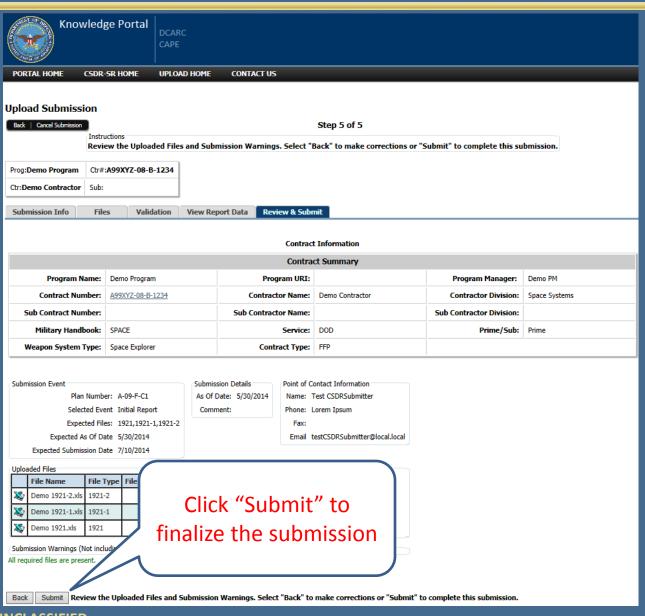
#### Step 4: View Data Report, cont.



Once the data
 report has been
 reviewed for all
 applicable 1921
 reports, click "Next"
 to continue



#### Step 5: Review and Submit



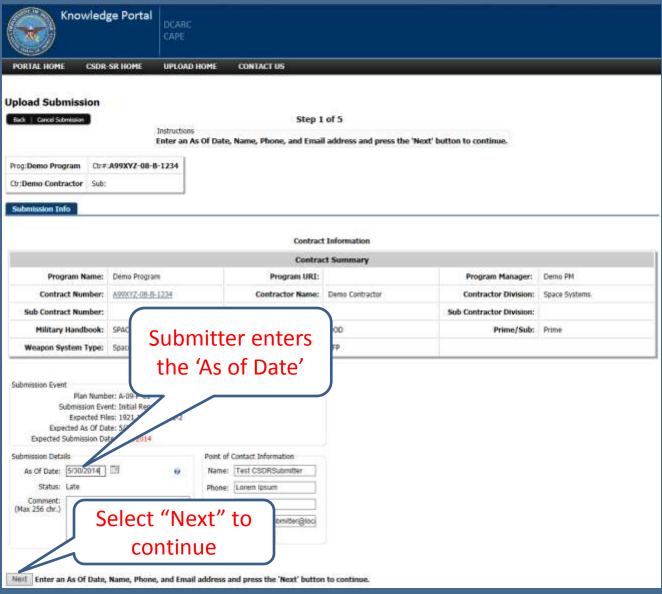
- Once the 1921, 19211, and 1921-2 reports
  have been validated,
  the CCDR Data Report
  has been generated,
  and the Submitter has
  reviewed their Data
  Report, then click
  "Submit" to finalize the
  submission
- The Submitter will receive an automatic email from the system as soon as their reports have been submitted



# Submitting XML Cost Reports



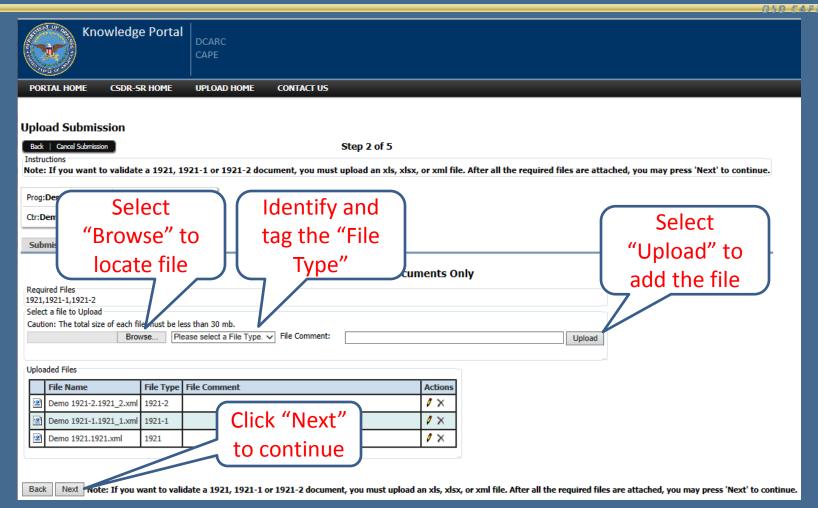
#### Step 1: Submission Info



- The Submitter will enter the report 'As of Date'
- Once the POC Information has been verified, select "Next" to continue



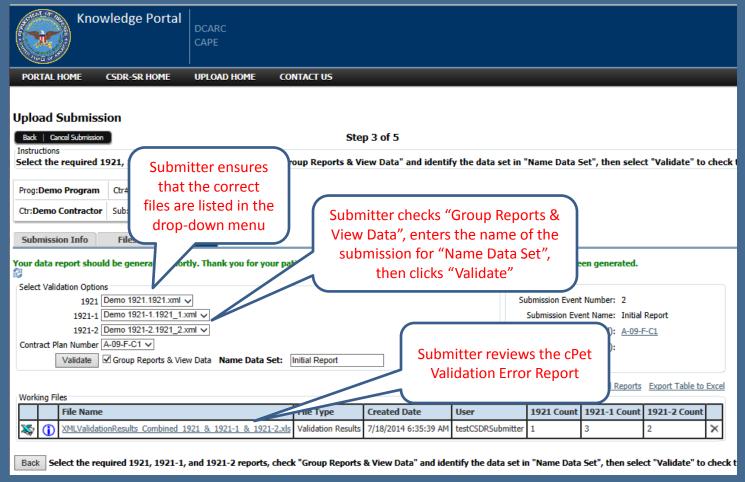
#### Step 2: Upload Files



- To upload the XML 1921 reports, select "Browse" to locate the report, select the correct "File Type", and click "Upload"
- Click "Next" to continue



#### Step 3: Validate and Create Data Report



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- Submitters must generate CCDR Data Report prior to submitting reports
- If the submission event requires multiple sets of 1921, 1921-1, and 1921-2 reports, a CCDR Report must be generated for each data set. For example, the report names could be: "Variant 1" and "Variant 2"



#### Step 3: Validate and Create Data Report, cont.

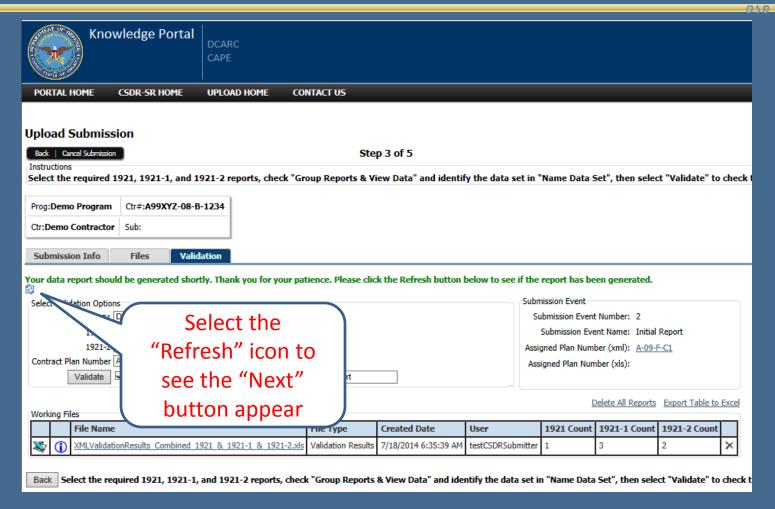
OSD CAPE

Validation Results					
Category	Severity	Location	Description	Details	Error Magnitude
Summary	505000000	Contract Plan	OK .		
Summary		1921 vs Contract Plan	OK.		
Summary	Error	1921 Internal	Major errors found.		
Summary	Error	1921-1 vs Contract Plan	Major errors found.		
Summary	Error	1921-1 vs 1921	Major errors found.		
Summary	Error	1921-1 Internal	Major errors found.		
Summary	Error	1921-2 vs Contract Plan	Major errors found.		
Summary	CITO.	1921-2 vs 1921	OK		
Summary	Error	1921-2 vs 1921-1	Major errors found.		
Summary	Error	1921-2 Internal	Major errors found.		
1921 Internal		WRS Element Code: 1.5	To Date figure is greater than At Completion figure.	Columns: Recurring	500.0
1921 Internal	Warning	WBS Element Name: User Equipment	to bace righte is greater than at Competion righte.	To Date Cost: \$k 1,000.0 At Completion Cost: \$k 500.0	500.0
1921 Internal	Error	Summary Element: Reporting Contractor Profit/Loss or Fee	Reporting Contractor Profit/Loss or Fee reports zero cost at completion.	A Secretary Secretary and American Secretary	
1921-1 vs Contract Plan	Error	WBS Element Code: 1.2.3 WBS Element Name: Communication / Payload	Required reporting element omitted from 1921-1 submission.		
1921-1 vs Contract Plan	Error	WBS Element Code: 1.2.3.2.2 WBS Element Name: KA to UHF Subsystem	Required reporting element amitted from 1921-1 submission.		
1921-1 vs Contract Plan	Error	WBS Element Code: 1.3 WBS Element Name: Ground (1. n as required)	Required reporting element anotted from 1921-1 submission.		
1921-1 vs Contract Plan	Error	WBS Element Code: 1.3.3 WBS Element Name: Command and Control Subsystem	Required reporting element amitted from 1921-1 submission.		
1921-1 vs 1921	Error	WBS Element Code from 1921; 1.0 WBS Element Name from 1921; 1.0 WBS Element Ame from 1921; 1.1 WBS Element Name from 1921; 1.5 WBS Element Name from 1921; 1.5 Docc System	Corresponding quantities on 1921-1 and 1921 do not match.	Column: At Completion Number of units reported on 1921: 1.0 / 1.0 Number of units reported on 1921-1: 1.0	
1921-1 Internal	Warning	WBS Element Name: Space Vehicle (1n as required)	To Date figure is greater than At Completion Figure.	Data Bernent: Direct Tooling Labor Hours Columns: Non-Recurring To Date Hours: 2.0 Hrs At Completion Hours: 0.0 Hrs	2.0
1921-1 Internal	Error	WBS Element Name: Space Vehicle (1n as required)	Nanrecurring/Recurring/Total figures do not sun correctly.	Data Bernent: Direct Tooling Labor Hours Columns: To Date Nonrecurring Hours: 2.0 Hrs Recurring Hours: 0.0 Hrs Total Hours: 0.0 Hrs	2.0
1921-1 Internal	Warning	WBS Element Code: 1.2 WBS Element Name: Space Vehicle (1n as required)	Data reported for Direct Labor Hours but not for Direct Labor Dollars.	Category: Tooling Column: To Date Non-Recurring Direct Labor Dollars: 0.0 Direct Labor Dollars: 0.0	
1921-2 vs Contract Plan	Error	WBS Element Code: 1.1 WBS Element Name: SEIT/PM and Other Common Elements	Required reporting element omitted from 1921-2 submission.		
1921-2 vs Contract Plan	Error	WBS Element Code: 1.2.3 WBS Element Name: Communication / Payload	Required reporting element omitted from 1921-2 submission.		
1921-2 vs Contract Flan	Error	WBS Element Code: 1.2,3,2,2 WBS Element Name: KA to UHF Subsystem	Required reporting element amitted from 1921-2 submission.		
1921-2 vs Contract Plan	Error	WBS Element Code: 1.3 WBS Element Name: Ground (1n as required)	Required reporting element omitted from 1921-2 submission.		
1921-2 vs Contract Plan	Error	WBS Element Code: 1.3.3 WBS Element Name: Command and Control Subsystem	Required reporting element omitted from 1921-2 submission.		
1921-2 vs 1921-1	Error	WBS Element Code from 1921-1: 1.0 WBS Element Name from 1921-1: Space System WBS Element Name from 1921-2: 1.0 WBS Element Name from 1921-2: Space System	Corresponding costs on 1921-1 and 1921-2 do not match.	nt: Raw Material Dollars ate Recurring 1921-1: \$k 10,000.0 021-2: \$k 0.0	10,000.0
1921-2 vs 1921-1	Error	WBS Element Code from 1921-1: 1.2	Corresponding costs on 1921-1 and 1921-2 do not match.	a agneering Labor Hours	0.0

cPet Validation Error Report



#### Step 3: Validate and Create Data Report, cont.



- The Data Report takes a minute to display
- Click the "Refresh" icon to see if the report has been generated
- The "Next" button will appear when the report has been generated



#### Step 4: View Data Report

Knowledge Portal CSDR-SR HOME UPLOAD HOHE Upload Submission Back Cancel Submission Verify the information in the "Contract Data" fields, then cl Prog:Demo Program Ch#:A99XYZ-08-B-1234 Ctr:Demo Contractor Sub Submission Info Contract Data Summary Elements To Date Initial Report Report Name: Initial Report 7/18/2014 Generation Date: Generated by Click to View Data Report 46' View Report Date Report IDs 1921-1 (0: 211 1921-2 (D: 136 1921 File Name Demo 1931, 1921, xml 1925-1 File Name Demo 1921-1-1921 Tarri 1925-7 Cla Name Demp 1921-2,1921, 2,oni W99NYZ-DE-B-1234 Contract Number A-05-F-C1 1867 Submission (D) Submission Event Number Submission Event Name initial Report Submitted Date At Of Date 10/71/2008 Supposed Cost To Date 468200.0 Reporting Contractor GSA To Date \$4000.0 Reporting Contractor Understanted Budget To Date | 0.0 Reporting Contractor Management Reserve To Date | 0.0 Reporting Contractor FCCM To Date 1500.0 Tonal Cost To Date \$23700.0 Reporting Contractor Profit/Loso or Fee To Date 0.0 Total Price To Date Next. Verify the information in the "Contract Data" fields

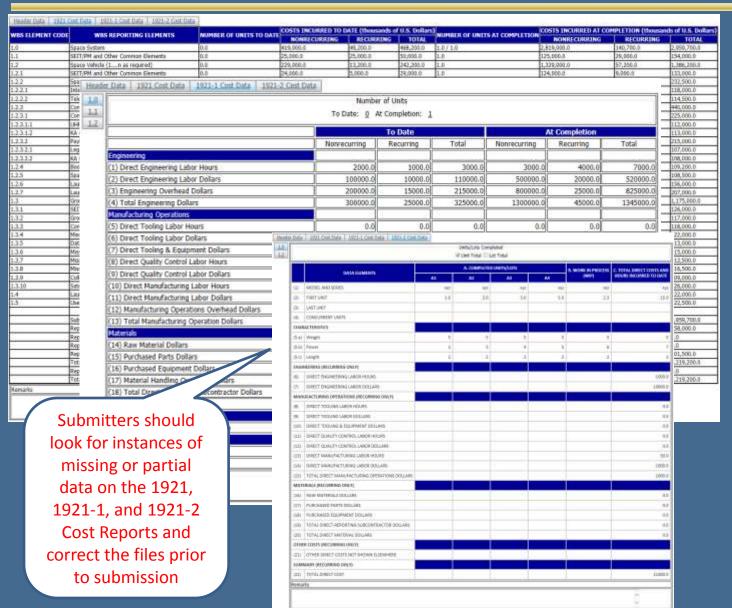
 Submitter clicks "View Data Report" to review Header Data, 1921 Cost Data, 1921-1 Cost Data, and 1921-2 Cost Data to ensure their XML data will be viewed accurately within the Submit-Review database



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#### Step 4: View Data Report, cont.



- The Data Report displays how the data will be viewed within the Submit-Review database
- Submitters
  should review
  the data for
  accuracy and
  completeness
- If the data is not reading into the Data Report correctly, the XML file should be updated prior to submission



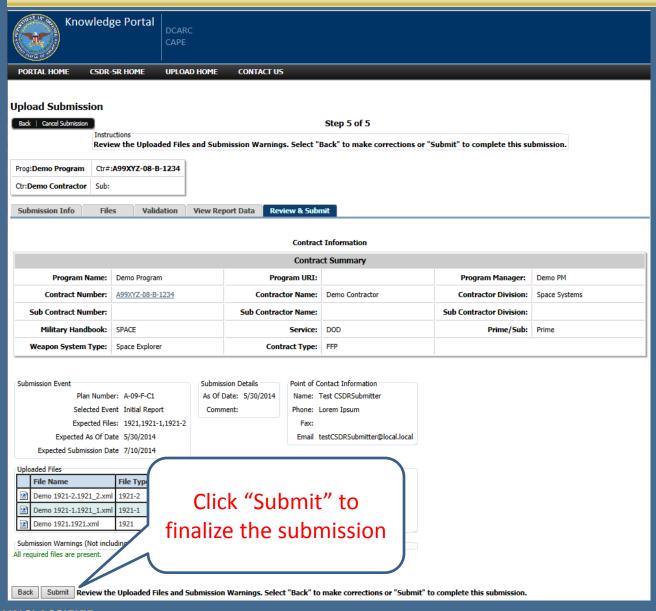
#### Step 4: View Data Report, cont.

Knowledge Poi	DCARC CAPE
PORTAL HOME CSDR-SR HOM	BE UPLOAD HOME CONTACT US
Ipload Submission	
Ext   Greek Edimentor Instructions	Step 4 of 5 "Contract Data" fields, then click "View Report Data" to review the 1921, 1921-1, and 19
Prog:Demo Program Cb#:A99XYZ Cb:Demo Contractor Sub:	-08-8-1234
Submission Info Files	Validation View Report Data Review & Submit
Contract Data Report Data Report Name: Initial Report Heade Data   1921 Cost Data   183	Control of the contro
	a. NAME: cPet Demonstration Space System (CDSS)
HAJOR PROGRAM	b. PHASE/MILESTONE: B
PRIME HISSION PRODUCT	Deno PMP
REPORTING ORGANIZATION TYPE	Prime/Associate Contractor
NAME/ADDRESS (Include ZIP Code)	a. PERPORPHING ORGANIZATION Denic Corporation, 456 Test Blvd, New York, NV, 55555
	b. DEVESTOR
APPROVED PLAN NUMBER.	X-08-Y-C1
OJSTOMER (Direct-reporting subcontra	
CONTRACT TYPE	Off
CONTRACT PRICE	3219200.8
CONTRACT CEILING	TV/A
	<ul> <li>CONTRACT NO.: ARRXYZ-08-8-1234</li> </ul>
1977CEH	b. LATEST HODIFICATION:
TYPE ACTION	c. SOLICITATION NO.:
	d. NAME: Dens
	e. TASK ORDER/DELIVERY ORDER/LOT NO.;
PERSOD OF PERFORMANCE	A. START DATE (HYYMMOD): 5/13/2008
	b. BIID DATE (YYYYHHIDD): 1/31/2010
APPROPRIATION	
REPORT CYCLE	
SUBMESSION NUMBER	Cliel ((Nove)) to
REPORT AS OF (Y1Y1MMDD)	Click "Next" to
DATE PREPARED (YYYYMADD)	
POINT OF CONTACT NAME	continue
POINT OF CONTACT DEPARTM	
POINT OF CONTACT PHOY	
POINT OF CONTACT	Months amounts

 Once the data report has been reviewed for all applicable 1921 reports, click "Next" to continue



#### Step 5: Review and Submit



- Once the 1921, 19211, and 1921-2 reports
  have been validated,
  the CCDR Data Report
  has been generated,
  and the Submitter has
  reviewed their Data
  Report, then click
  "Submit" to finalize
  the submission
- The Submitter will receive an automatic email from the system as soon as their reports have been submitted

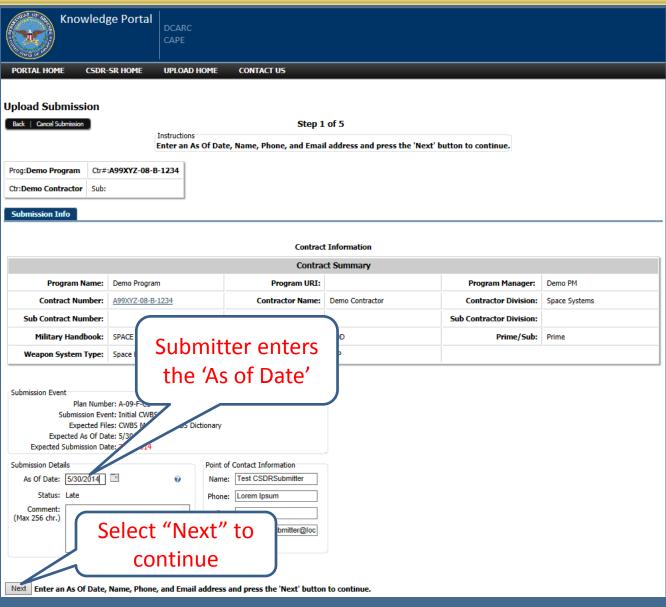
37



# Submitting Software Reports and CWBS Dictionaries



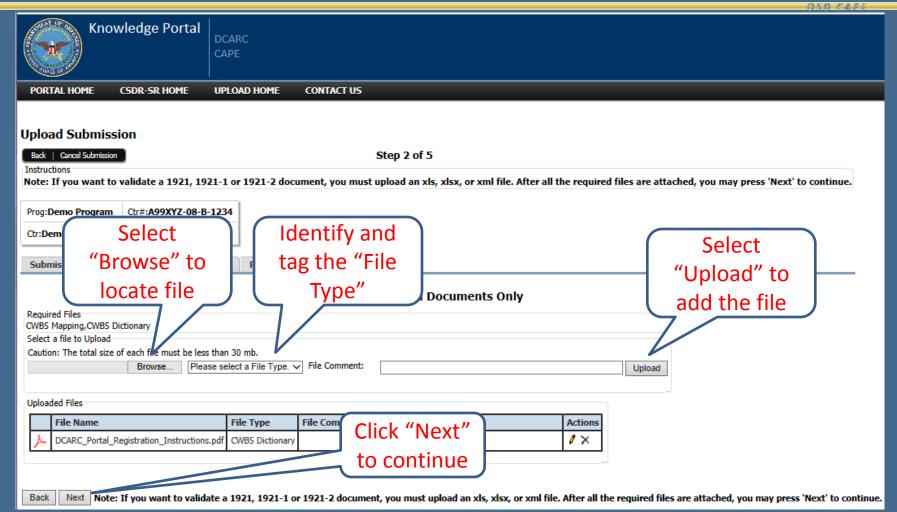
#### Step 1: Submission Info



- The Submitter will enter the report 'As of Date'
- Once the POC Information has been verified, select "Next" to continue



#### Step 2: Upload Files

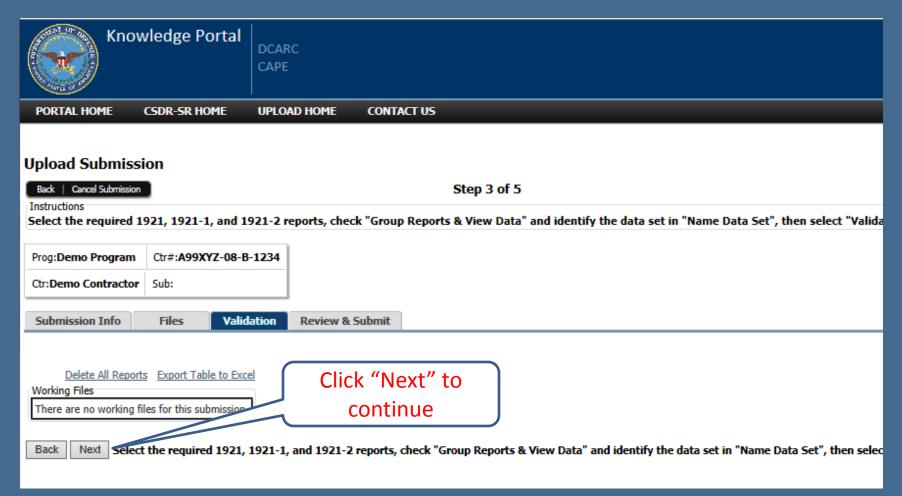


- To upload a CWBS Dictionary or Software Report (SRDR), select "Browse" to locate the report, select the correct "File Type", and click "Upload"
- Click "Next" to continue



#### Step 3: Validation

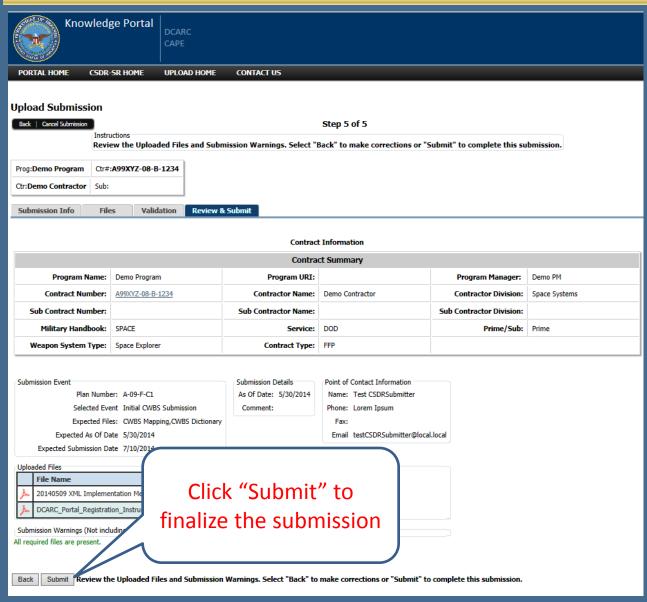
DER CAFE



- Submitters are not required to validate CWBS Dictionaries or Software Reports (SRDRs)
- Click "Next" to continue



#### Step 5: Review and Submit



- Once the required documents have been uploaded, click "Submit" to finalize the submission
- The Submitter will receive an automatic email from the system as soon as their reports have been submitted

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ISB CAFE

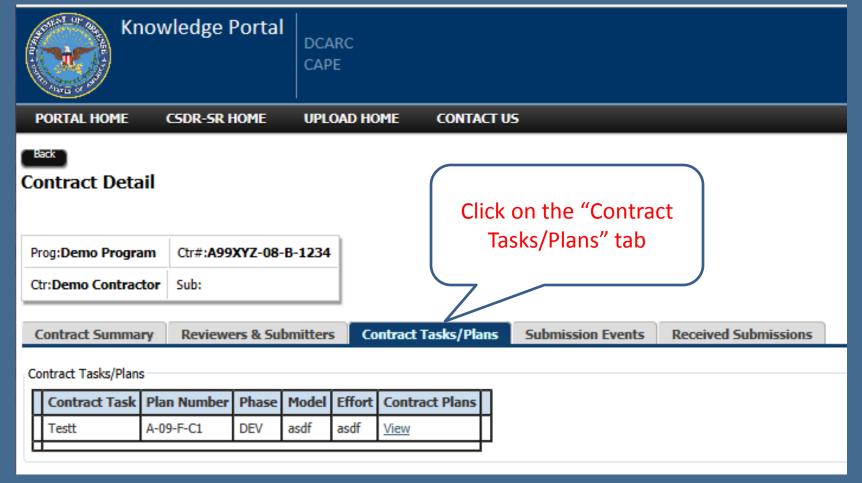
- To access the CSDR plans the DCARC has on file for your contracts you
  must access the Contract Detail screen for each contract.
- You can access the Contract Detail screen by clicking on the contract number hyperlink on the "Assigned Contracts" tab on the Upload Home page:



unclassified 4



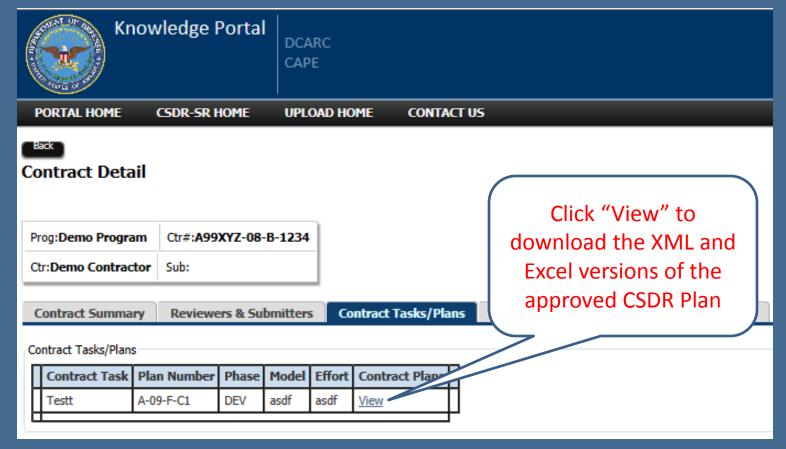
 From the Contract Detail screen select the "Contract Tasks/Plans" tab:



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 Selecting "View" will allow you to access both the XML and Excel version of the CSDR plans that are currently on file:



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The Excel and XML versions of the approved CSDR
 Plan can also be viewed and downloaded during Step
 3 of the submission process:

